



DEPARTMENT OF THE NAVY  
HEADQUARTERS UNITED STATES MARINE CORPS  
WASHINGTON, DC 20380-0001

MCO 5213.8  
ARDB  
4 May 90

MARINE CORPS ORDER 5213.8

From: Commandant of the Marine Corps  
To: Distribution List

Subj: MANAGEMENT OF BLANK FORMS AT HEADQUARTERS MARINE CORPS  
(HQMC), MARINE CORPS COMBAT DEVELOPMENT COMMAND (MCCDC),  
AND MARINE CORPS RESEARCH, DEVELOPMENT, AND ACQUISITION  
COMMAND (MCRDAC)

Ref: (a) MCO 5213.7C

Encl: (1) Staffing and Review Procedures  
(2) Leadtimes and Requisitioning Procedures

1. Purpose. To provide guidance for the management of blank forms within HQMC, MCCDC, and MCRDAC.

2. Cancellation. HQO 5213.4E.

3. Information

a. Forms constitute a major part of Marine Corps paperwork operations. An estimated 75 percent of all paperwork in the Marine Corps is handled through the use of forms. For that reason, it is particularly important to ensure that matters pertaining to the use of forms are properly administered.

b. The Commandant of the Marine Corps is responsible to the Secretary of the Navy for conducting a continuing and systematic analysis of all forms and related procedures used by the Marine Corps. This responsibility has been further delegated to the Director of Administration and Resource Management (DirAR (ARDB)).

c. Reference (a) sets forth basic policy for the management of blank forms in the Marine Corps and should be used in conjunction with this Order when matters relating to blank forms are considered.

d. The management and control of forms prepared, printed, and controlled with nonappropriated funds are exempted from the provisions of this Order.

4. Guidance

a. Individuals with responsibilities for blank forms implementation should familiarize themselves with enclosure (1)

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and actively participate in accomplishing the actions described. Following the sequence of actions shown in enclosure (1) will ensure that necessary technical analysis of forms and related procedures is accomplished; that forms undergo carefully controlled implementation; that forms are periodically reviewed to validate their continued need; and that forms are reprinted as required.

b. Appendix A to enclosure (1) graphically depicts the staffing and review procedures for developing and introducing forms into the Marine Corps Forms Management System.

c. Leadtimes and Requisitioning Procedures. The introduction and maintenance of blank forms into the Marine Corps require consideration for printing leadtimes and requisitioning procedures. Enclosure (2) provides detailed information concerning these areas.

#### 5. Electronic and Computer-Generated Forms

a. Electronic Form. A form created, transmitted, filled-in, filed, and destroyed electronically and can be reproduced from computer memory.

b. Computer-Generated Form. A form designed on pin-feed paper to be used in various computer systems.

c. Electronic and computer-generated forms do not change the definition of a form. Factors to be considered when evaluating proposed electronic and computer-generated forms are:

(1) Does the preparation method lower the total costs?

(2) Does the preparation method increase productivity?

(3) Will the new form require expensive or additional training for the user? Will usefulness be lost with reassignment of personnel?

(4) Does the new form require software maintenance?

(5) Will the data be shared? If so, do all users have compatible software, hardware, and adequate training?

(6) Will the new form require expensive or additional hardware?

d. Responsibilities for Development and Use

(1) HQMC staff agencies, MCCDC, and MCRDAC will designate an individual as the focal point for electronic and computer-generated forms. The designated individual must be familiar with the capabilities and limitations of electronic hardware and software in their department, division, or separate office. Provide the name and telephone number of the designated individual to the DirAR (ARDB).

(2) Sponsors/originators will:

(a) Refrain from purchasing forms software packages without obtaining approval from the DirAR (ARDB).

(b) Use personal computers, word processing, and related software packages to develop forms, when practicable.

(c) Ensure that existing NAVMC forms (forms authorized for use Marine Corps-wide) and NAVMC HQ forms (forms authorized for HQMC, MCCDC, and MCRDAC use) are not duplicated by electronic processes unless written approval from the sponsor/originator and the DirAR (ARDB) has been obtained.

(d) Ensure that the electronic form is a "mirror" image of the blank official NAVMC/NAVMC HQ version, unaltered in any way.

(e) Ensure that the prescribed software and hardware are accessible to all users. When the output is disk or diskette, provide all users with either copies of the disk or diskette, or purchase the necessary copies of the software with operating instructions. Assume complete responsibility for producing, reproducing, storing, and distributing the output product.

(3) The DirAR (ARDB) will publish a list of approved NAVMC/NAVMC HQ electronic forms periodically.

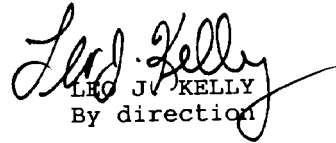
6. Action

a. Promptly advise the DirAR (ARDB) of forms requiring revision or becoming obsolete in order to prevent continued printing for supply system stocks.

b. Adhere to the guidance and instructions outlined in reference (a) and this Order when developing both manual and electronic forms. Attention should be given to the staffing actions outlined in enclosure (1) and the leadtimes and requisitioning procedures in enclosure (2).

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7. Reserve Applicability. This Order is not applicable to the Marine Corps Reserve.

  
LEO J. KELLY  
By direction

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STAFFING AND REVIEW PROCEDURES

1. Staffing Procedures for New NAVMC/NAVMC HQ Forms

a. Sponsor/originator recognizes need for a new form or revision of existing form. Furnishes rough of proposed form and implementing directive to the DirAR (ARDB) for review.

b. The DirAR (ARDB) analyzes sponsor's/originator's proposal to determine need for form, reviews form's contents for arrangement of material, develops design, and determines physical characteristics to conform with requirements. Ensures that sponsor's/originator's implementing directive includes adequate data for form's use and that availability of printed forms coincides with release of sponsor's/originator's implementing directive. Furnishes design of form to sponsor/originators for approval, along with procurement request (NAVMC HQ 774 - NAVMC Blank Form Authorization and Initial Procurement Action).

c. After formal staffing is accomplished, the sponsor/originator completes the functional analysis form (NAVMC HQ 743 - Blank Forms Functional Analysis) and the procurement request (NAVMC HQ 774) by estimating quantity to be procured based on actual annual usage. Approve design and return to the DirAR (ARDB).

d. The DirAR (ARDB) codes management data and data elements for machine entry into the forms database. For NAVMC forms, adds printing specifications and forwards with design and procurement request to Marine Corps Logistics Base (MCLB) (838), Albany, Georgia. For NAVMC HQ forms, adds printing specifications and forwards to the DirAR (AREA) for printing procurement.

e. For NAVMC forms, MCLB, Albany (838-2) determines quantity to be procured for Marine Corps Supply System stocks and directs cataloging action. MCLB, Albany (854-2) forwards design, printing specifications, and procurement request to MCLB, Albany (854-1). MCLB, Albany (854-1) prepares formal printing specifications and procures form from printer (Government Printing Office (GPO), Navy Publishing and Printing Service Offices (NPPSO), or commercial sources) for delivery to USMC stocking locations, or users, as appropriate.

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f. For NAVMC HQ forms, the DirAR (AREA) prepares formal printing specifications, provides the DirAR (ARDB) with a copy of the printing request, and procures form from printer (GPO, DPS, or Commercial sources) for delivery to the DirAR (ARG) stock or HQMC, MCCDC, or MCRDAC users, as appropriate.

## 2. Staffing Procedures for Review and Evaluation Prior to Resupply

a. Sponsor/originator informs the DirAR (ARDB) that form requires revision prior to replenishment/reprint for Marine Corps Supply System stock or HQMC use, as appropriate.

b. The DirAR (ARDB) informs MCLB, Albany (838-2) for NAVMC forms or the DirAR (ARG) for NAVMC HQ forms, as appropriate, that form is to be revised prior to replenishment/reprint of stock.

c. MCLB, Albany (838-2) or the DirAR (ARG), as appropriate, informs the DirAR (ARDB) when replenishment/reprint becomes necessary.

d. The DirAR (ARDB) in conjunction with forms sponsor/originator makes revision and codes management data and data elements for database. For NAVMC HQ forms, adds printing specifications and forwards design and printing specifications to the DirAR (AREA) for printing procurement.

e. For NAVMC forms, MCLB, Albany (838-2) determines quantity to be procured for Marine Corps Supply System stocks and directs cataloging action. MCLB, Albany (854-2) forwards design, printing specifications, and procurement request to MCLB, Albany (854-1) for printing procurement. MCLB, Albany (854-1) prepares formal printing specifications and procures form from printer (GPO), NPPSO, or commercial sources) for delivery to Marine Corps stocking locations, or users, as appropriate.

f. For NAVMC HQ forms, the DirAR (AREA) prepares formal printing specifications, provides the DirAR (ARDB) with a copy of the printing request, and procures form from printer (GPO, NPPSO, or commercial sources) for delivery to the DirAR (ARG) stock or HQMC, MCCDC, or MCRDAC users, as appropriate.

## 3. Validation of NAVMC and NAVMC HQ Forms with Sponsors/originators for review.

a. The DirAR (ARDB) prepares computer printouts of NAVMC and NAVMC HQ forms by sponsor/originator codes and distributes listing to sponsors/originators for review.

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b. Sponsors/originators annotate on print-out and identify active/obsolete forms. Adds name and phone numbers of contact representative for each form. Returns annotated printout to the DirAR (ARDB).

c. The DirAR (ARDB) updates files and directs disposal of obsolete forms stocked in Marine Corps Supply System; the DirAR (ARG) stocks, and updates printing and supply procurement records and stocklist (SL-8).

d. MCLB, Albany (838-2) or the DirAR (ARG) effects disposal of obsolete NAVMC or NAVMC HQ forms in supply system stocks and adjusts inventory and stocklist accordingly.

#### 4. Other Government Agency Forms

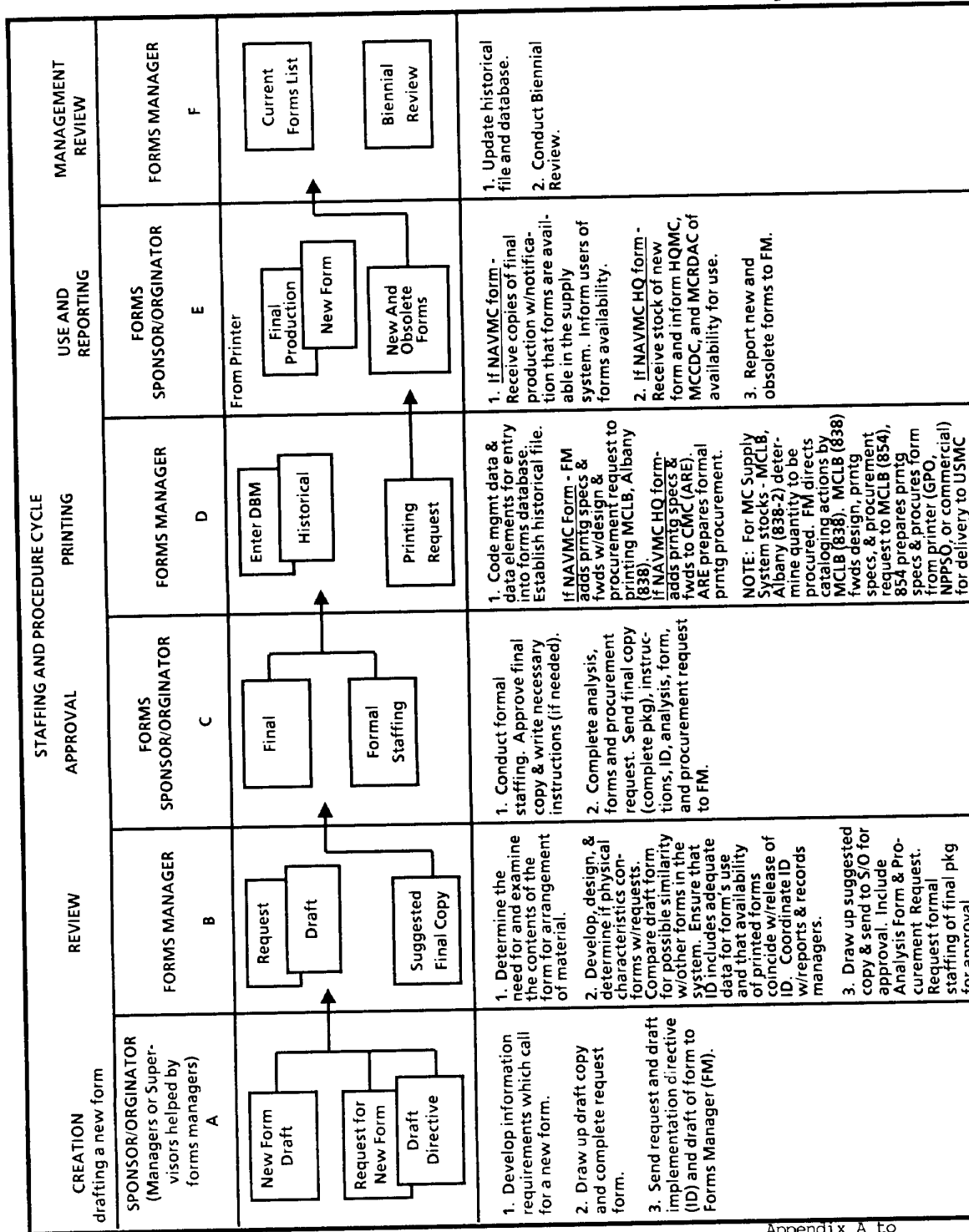
a. Forms sponsor/originator recognizes need for other Government agency forms. Furnishes implementing directive to the DirAR (ARDB) for review.

b. The DirAR (ARDB) reviews sponsor's/originator's proposal. Contacts Government agency to determine status and availability of form. Determines if form is technically suitable for sponsor's/originator's proposed procedure; arranges for USMC arranges for USMC adoption.

c. The DirAR (ARDB) has the sponsor/originator complete the request for procurement of forms and return to the DirAR (ARDB). Estimated quantity to be procured is based on actual annual usage. The DirAR (ARDB) includes the printing specifications and forwards all to the Naval Publications and Forms Center (Cognizance I), Philadelphia, Pennsylvania, for procurement and stocking.

d. Naval Publications and Forms Center, Philadelphia, Pennsylvania, arranges for printing/procurement of Marine Corps-sponsored requirements and stocks, and issues in the Navy Cognizance I Supply System.

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LEADTIMES AND REQUISITIONING PROCEDURES

1. Leadtimes. Staffing and review time and time elements listed below must be considered when proposed Marine Corps directives require the use of forms.

a. Except for specialty-type forms, the following normal leadtime is required for printing of forms:

- (1) GPO . . . . . 3 months
- (2) DPS . . . . . 2 months

b. In addition to the above leadtimes, sponsors/originators must allow a minimum of 3 weeks for analysis, preparation of designs and printing specifications, processing paperwork for procurement of quantities for stock, and shipping forms by printer to the Marine Corps stockpoints.

c. Printing of forms may be done by the GPO, DPS, NPPSO, or commercial printers. Selection depends on the quantity of forms to be procured, physical complexity, layout, and content of the form. Marine Corps NAVMC forms are stocked in the Marine Corps Supply System. Other Government agency forms used by the Marine Corps (DD, SF, NAVCOMPT, OF, etc.) are stocked in the Navy Publications and Forms Center Supply System (Cognizance I).

2. Specialty-Type Forms

a. Ignoring leadtimes required for development and printing of forms, particularly "specialty-type" categories during the inception and staffing stages of the form leads to selection of arbitrary and unrealistic delivery dates. Inevitable results are delays in the sponsor's/originator's planned implementation of procedures, accelerated printing costs, or the high probability that no bids will be received because of printers' inability to meet unrealistic delivery dates.

b. Minimum leadtimes for "specialty-type" forms are listed below. In addition, time must be allowed for designing and writing specifications, obligation of funds, selection and placement of orders with specialty forms printers by the GPO, shipping time, and positioning of stocks in Marine Corps or Navy supply systems. Leadtimes are based on the date the order is received by the commercial forms printer from GPO and ends with the date of shipment (not the receipt date by the supply system or user).

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(1) Optical Character Recognition (OCR) 180 days  
Forms. (In addition to the requirements set forth above, allow time for testing of the production samples.)

(2) Carbon-Interleaved, Marginally Punched, 75-90 days  
Continuous Forms. (For use on computer printers and pin-feed platen typewriters. Extensions of leadtimes prevail when specialty-type safety papers, Davac-backed paper, translucent masters, etc., are incorporated.)

(3) Carbon-Interleaved Snap-Sets. 90 days  
(Including EAM cards, but exclusive of snap-sets requiring specialty-type papers.)

(4) Optical Mark Page Reader (Not OCR). 90 days  
(Including marginally punched, continuous, and snap-sets versions.)

3. Initial distribution of newly prescribed NAVMC forms to using activities will be made only in those instances when users requisitions to supply system stock cannot be fulfilled prior to implementation date. In those cases, sponsors/originators will initiate the list of using activities and quantities to be shipped to each activity and make distribution by mail from HQMC, MCCDC, or MCRDAC. ((With the inception of stock-funding of blank forms, there are no provisions for initial or automatic distribution.)

4. NAVMC HQ forms are used only at HQMC staff agencies, MCCDC, and MCRDAC and are generally stocked by the originating office. NAVMC HQ forms used by more than one office are stocked by the DirAR (ARG).

#### 5. Requisitioning Procedures

a. NAVMC HQ forms which have been developed for use by a single staff agency or office will be stocked by that office/agency and not in any Marine Corps or other Government agency supply system. It is incumbent upon that using office to determine what constitutes a 6-month reorder point; and when that point is reached, submit a requisition (NAVMC HQ 333) for a 1-year requirement. Replenishment of stock will be done by reprinting. Requisitions (NAVMC HQ 333) will be submitted to the DirAR (ARG). Requisitions will include the form prefix (NAVMC, NAVMC HQ, DD, etc.), the form number and current edition date,

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the title, unit of issue (sheet, pad, package, set, etc., NOT box, carton, etc.), and the quantity of unit of issue required. Requisitions which do not include this information and are sent directly to the DirAR (ARDB) will be returned without action. The DirAR (ARG) will coordinate ALL requisitions received with the DirAR (ARDB). This coordination is required to ensure the currency of the form being ordered, to determine whether revision is required, and to update the form history records.

b. In those cases when storage space within the sponsor's/originator's office cannot accommodate a 1-year supply of single-office/staff agency-used forms, arrangements can be made with the DirAR (ARG) to STORE, NOT STOCK forms in the HQMC warehouse. In this instance, it will be the responsibility of the sponsor/originator to maintain a stock record of each form stored so that when the minimum 6-month reorder point is reached, the sponsor/originator will requisition the reprinting of the 1-year minimum supply. The sponsor/originator may contact the DirAR (ARG) for an account of what is stocked in the warehouse.

c. NAVMC HQ forms used by more than one staff agency or office (such as NAVMC HQ 333) are stocked by the DirAR (ARG) and will continue to be requisitioned by users from that source. The DirAR (ARG) is responsible for maintaining sufficient stocks of these multi-user form and replenish stocks, by printing, when the 6-month reorder point is reached.

d. Requisitions for NAVMC (not NAVMC HQ) forms and other Government agency forms (DD, SF, NAVCOMPT, etc.) which are stock items in either the Navy, Marine Corps, or GSA supply systems, as appropriate, are not affected by these instructions except that requisitions will include the information contained in paragraph 5a above, plus the National Stock Number (NSN) if known. Requisitions for these forms will be submitted to the DirAR (ARG) for action, and the DirAR (ARG) will coordinate all requisitions for the printing or reprinting with the DirAR (ARDB).

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